Batch Processes
Using Connexion Client, MarcEdit, and Microsoft Access

General idea is to expedite the cataloging of similar items.

The more the things have in common, the better this will work.

Depending on the specific circumstances, you might use this whole procedure or might skip certain parts of it.
Sample set used for this talk:

Big stack of piano etudes

The great majority are in the series Progressive Series Studies

A few are from similarly titled series, such as Progressive Series Compositions.

This presentation will talk about only the Progressive Series Studies publications
Here is one of the items.

Front has “Annotation” – what technical problem this etude addresses, and some hints for practice.

Music starts on the next page.

The title on the front is seldom the title of the piece.

The caption title normally is the better choice.
## Summary of Process

<table>
<thead>
<tr>
<th>Sort and search</th>
<th>Create skeleton records for not-found items</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sort into similar items</td>
<td>• Microsoft Access</td>
</tr>
<tr>
<td>• Use Batch search in Connexion to find copy when it exists</td>
<td>• MarcEdit</td>
</tr>
<tr>
<td>• Search the not-found items by keyword or other conventional method</td>
<td>• Connexion</td>
</tr>
</tbody>
</table>
Fill out copy or skeleton record

- Add Constant Data

Finish

- Cataloger goes over result, one record at a time
Batch Searching

In Connexion

To start a batch search
In the resulting window, enter search statements

• Type in the Query box
• Press enter or click Add to put the statement into the big box

After typing all the searches, click “Save.” Nothing appears to happen, but this is essential. It associates the search statements with the local file named at the top of the window.

Then click “Close.”
Next you actually run the searches you just entered and saved.

**Under Process Batch**

Check the file your search queries are associated with

Click “Online Searches”

Click OK and the search will execute.

Any records found will be saved into the file that was checked

You will get a report of what worked and what didn’t.
Here is the start of the copy found for the item pictured at the beginning of this talk.
Not found

- Do keyword or other searches “live”
- Some additional records will turn up this way

Items not found by batch searching can be searched by conventional methods.

This finds a few more items that were cataloged oddly.

But if your search statements are chosen wisely (and entered accurately), not a lot more copy will turn up.
For those items without copy, you can enter data in Microsoft Access, process it through MarcEdit, and import it into Connexion.

This is not always the most useful method.

Often you would be better off working directly in Connexion.
In MS Access, design an input form for those pieces of information that change. This is one filled out.

Things to note:

• No way to input special characters, so
  • PubDate has the copyright date, with just the letter c.
  • If the composer name (or title) has diacritics, they are ignored at this point.

• This creates an underlying table with this data

• You export this to Excel, using a function within MS Access (in the “External Data” tab).
In Excel

Upon export, the result looks like this.

Here OpenRefine could be used for some authority control, for example on the composers.
Still in Excel but preparing for MarcEdit

Copy and paste the data from the table exported to Excel into a sheet with the desired MARC headings.

Notice that I use 260 here. It will become 264 later.

There is a MarcEdit tutorial on the Delimited Text Translator (the tool you use next) that explains how to do these MARC tags

If you have the headings in a spreadsheet to which you copy the data, you don’t have to figure them out again every time.
Once you have the Excel spreadsheet with MARC tags, go to MarcEdit

Click Delimited Text Translator
In the Delimited Text Translator

Name the source and output files.

Name the Excel sheet that has the data (Use its actual name from the tab at the bottom – can be Sheet1, if you didn’t rename the sheet)

Leave the Delimiter as it comes up

Click Edit LDR/008 and choose the format you want (in this case, score)
You get this screen.

Data Snapshot is the imported data.

Use Auto Generate to change your headers into commands that will create MARC records

Result appears in the Arguments box.

Then click Finish

All you do is three steps: Import → Click Auto Generate → Click Finish
This process creates a file with the extension .mrk.

If you open it in MarcEditor (one of the tools in MarcEdit), here’s how it looks.
Run the result through RDA Helper (another tool in MarcEdit).

Notice that the 260 has been processed into 264 1 and 264 4, with the correct brackets and copyright symbol.

Choosing Score for LDR/008 in the Delimited Text Translator gives you the right 336.

If you skip this step, it is processed as text.

337 and 338 are also added.

Compile this into MARC.
Now the compiled file needs to be loaded into Connexion

File | Import Records

Fill in the boxes and click OK.
This is one of the records that results.

Various things about this are not quite right,

but, this record is to a state that a cataloger can work with it.
Adding Constant Data to a List

This can be part of editing the records with copy

Or of editing the brief MARC records produced through MarcEdit
I want to apply the same constant data to every one of these records.

Highlight the whole list

Pick the constant data you want

Click Apply Selected.
Every record now has the constant data added

In this case, the constant data was just the 500 note saying THIS IS THE ADDED LINE.

You can do this with a long list of records and with extensive constant data.
I have made a Constant Data record for this series.

When I add this to the minimal record created by the previous steps, I get what is shown here.

Then records are finished up by a cataloger – necessarily one-by-one at this point.
Cut and paste data within the record

Fix spacing

Control headings

Find the authorized title for the piece

You come out with a reasonable record.
Thank you!

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